# NC eProcurement

# Inventory Items
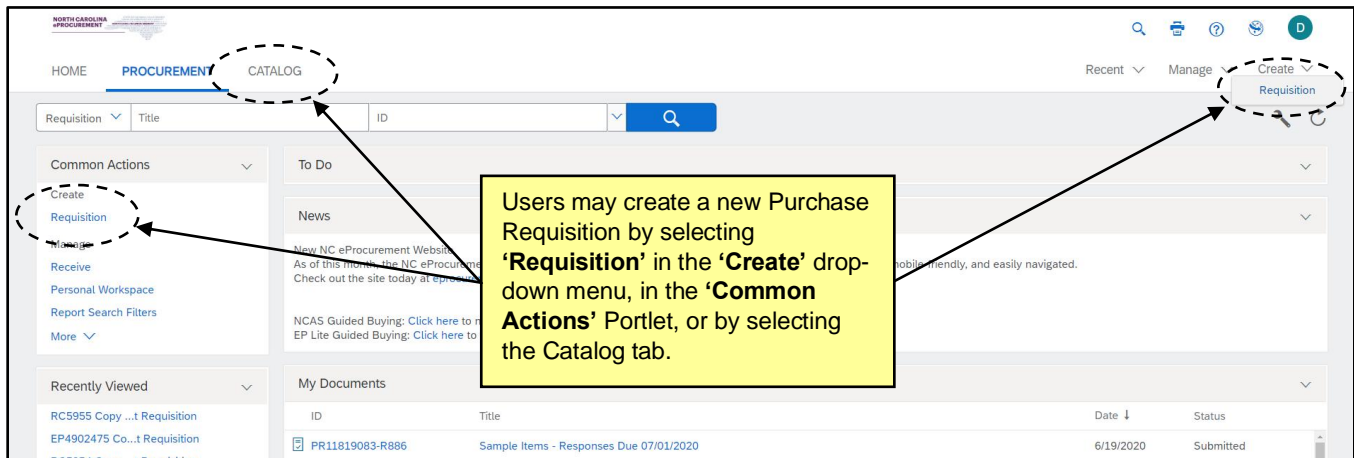
DHHS and DPS users in the **'NCAS Warehouse Purchaser'** group can track inventory purchases using the **'Item ID'** and **'Warehouse ID'** fields in NC eProcurement. Purchases using these fields will be transmitted to NCAS and will update the *on-order* inventory level within the NCAS inventory module.

Once the goods are physically received, and a receipt is entered into NC eProcurement and processed through NCAS, the *on-hand* inventory level within NCAS will be updated.

## I. Inventory Items in Expert View

1. From the NC eProcurement Procurement tab, click **'Requisition'** from the **'Create'** Shortcut Menu on the Menu Bar the **'Common Actions'** Portlet, or select the Catalog tab, to start creating the Purchase Requisition (PR).



> Users may create a new Purchase Requisition by selecting **'Requisition'** in the **'Create'** drop-down menu, in the **'Common Actions'** Portlet, or by selecting the Catalog tab.

2. Click the **'Add Non-Catalog Item'** button to enter non-catalog information.
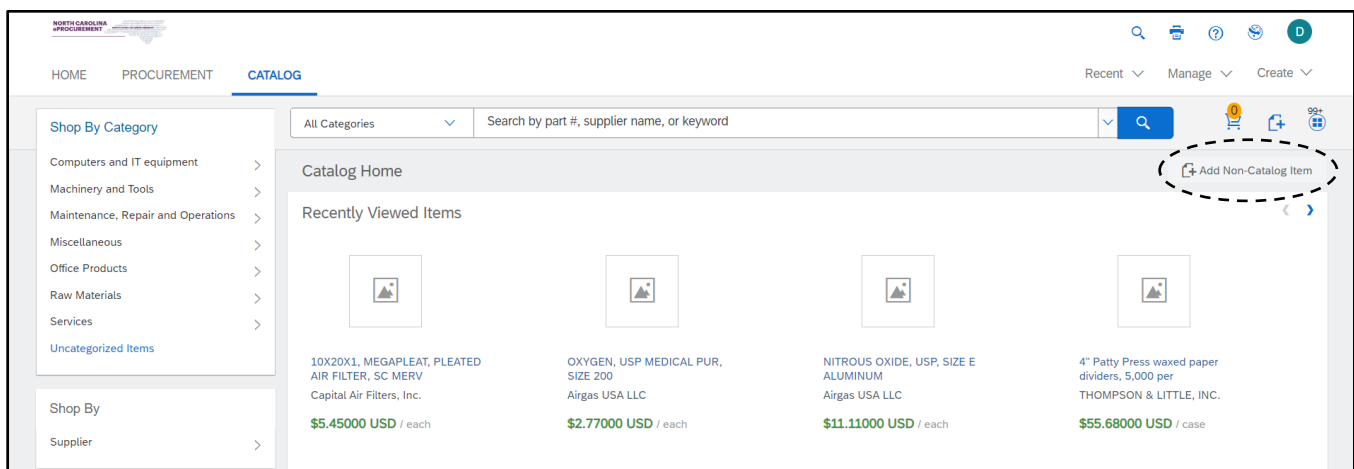
3.  Add an **'Item ID'** and a **'Warehouse ID'** to the line item by using the drop-down arrows and selecting '**Search more.**'

    **Note:** The **'Warehouse ID'** field values will be scoped based on the selected **'Item ID.'**



4.  The following fields will automatically populate based on the selected **'Item ID'** and **'Warehouse ID'** values.

    a.  **Stock Keeping Unit** - Inventory items are replenished using a Stock Keeping Unit (SKU). This field defaults based on the Item ID and is not editable.

    b.  **Company** – Once populated, this field is editable by the user.

        **Note:** If the Company, Account, or Cost Center is set as a default value in the user's profile, the inventory item will not overwrite the user's chosen preferences. It will, however, populate any remaining non-defaulted accounting fields. If the user does not have a default value set in their profile, the selection of the inventory item will default the appropriate NCAS values.

    c.  **Account** – Once populated, this field is editable by the user.

    d.  **Cost Center** – Once populated, this field is editable by the user.

    **Note:** If a user has manually entered a value in any of the above fields before the **'Item ID'** has been selected, or if they are editing a catalog line item, the default values will not overwrite the user-entered values.

5. The following fields will need to be populated with the correct information to match the **Item ID** field.

    a. **Full Description** – a detailed explanation of the item.

    b. **Commodity Code** – the appropriate 6-digit UNSPSC Commodity Code.

    c. **Price –** the cost based on Unit of Measure.

    d. **Unit of Measure** – the selected **Unit of Measure** must match the Stock Keeping Unit associated with the inventory **Item ID.**

    e. **SKU Quantity –** This field is equal to the **Conversion Factor** multiplied by the **Quantity**. This field is not editable.

       **Example**: The SKU for an **Item ID** is **'each,'** but the **Unit of Measure** on a catalog line item is **'box.'** The **Conversion Factor** would be the number of items in the box.

    f. Select a **'Supplier'** using the drop-down menu if necessary. If the desired supplier is not displayed in the previous choices, click **'Search for more…'** to select the appropriate supplier**.**

    g. The **'Location'** field automatically populates when a Supplier is selected. To change the default Location, click the **'Select'** link to the right of the field.

    h. Adjust the quantity in the **'Quantity'** field if necessary.

**Note:** The **'Item ID,' 'Warehouse ID,' 'Stock Keeping Unit,' 'Conversion Factor,'** and **'SKU Quantity'** fields are not editable via the Mass Edit process.

**Note:** Shipping/Freight charges should be included as a separate line item on the PR using the freight commodity code, **'781018 – Road cargo transport.'** This commodity code will exempt the supplier from the 1.75% transaction fee on shipping.



Information from the **'Item ID'** selection screen can be used to populate the line item.

6. Click **'Add to Cart'** to go back to the Catalog.

7. Add additional line items to the cart if needed, then click '**Proceed to Checkout**' to reach the PR Summary page,

   **Note:** Select the shopping cart icon to display all line items currently in the cart, and to reveal the '**Proceed to Checkout**' button.
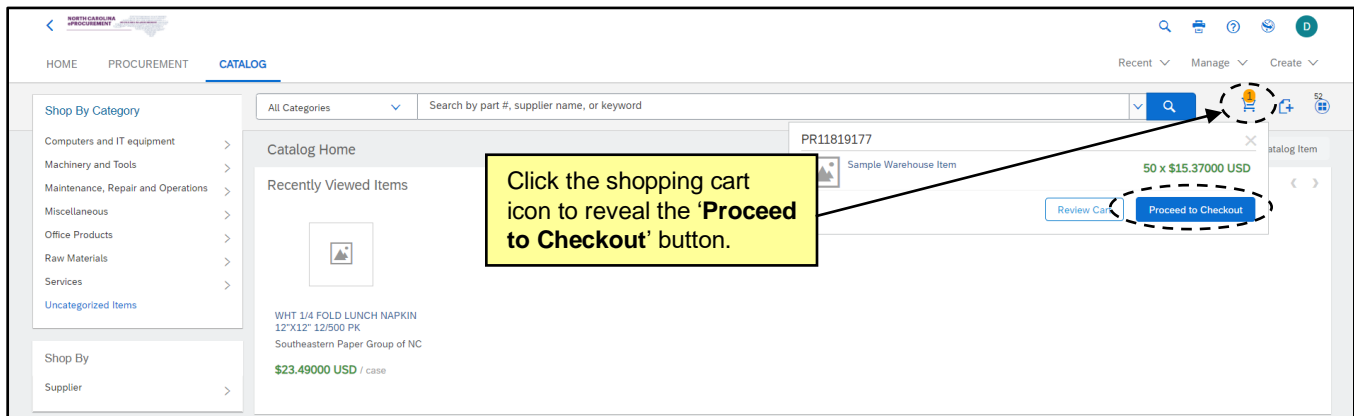


8. On the Summary page, add a Title to the PR.

   **Note:** To prevent errors in the event of a change order, it is recommended that inventory and non-inventory items are entered on separate PRs.

9. After reviewing the PR details for any incorrect information, click **'Submit.'**
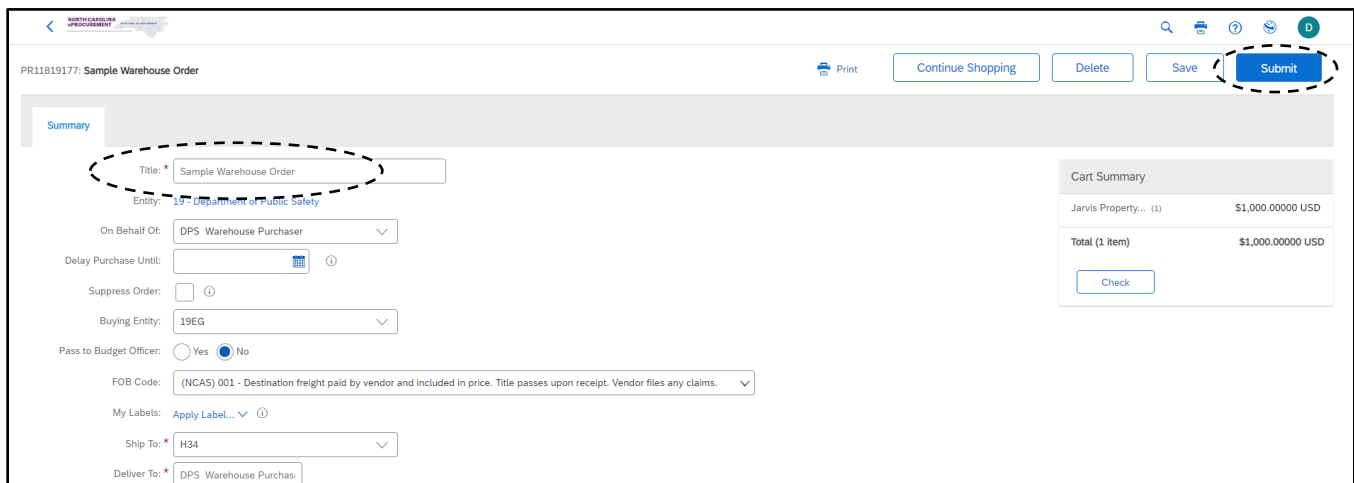
## II. Inventory Items in Guided Buying

Inventory items may also be created in Guided Buying. Purchase Requisitions (PRs) created in either view will be visible in both views.

1. From the Guided Buying landing page, click '**Request a non-catalog item.**'



Click on '**Request a non-catalog item'** to initiate the Purchase Requisition.
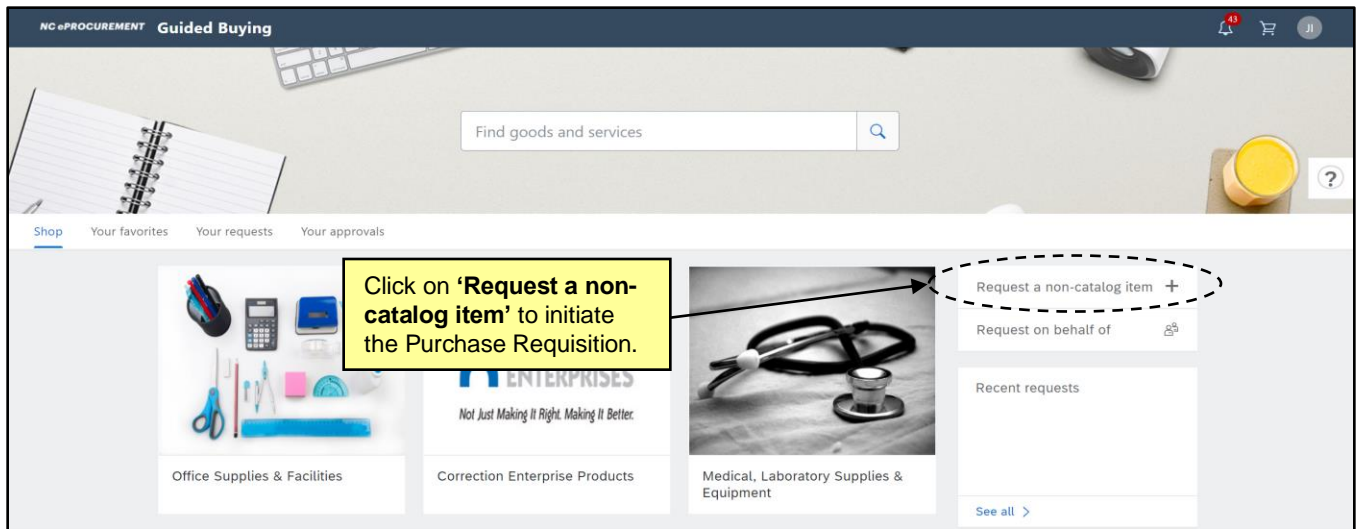
2. On the Non-catalog request page, add in the required line item details.

3. Click '**Add to cart**' to add this line item to the shopping cart in Guided Buying.
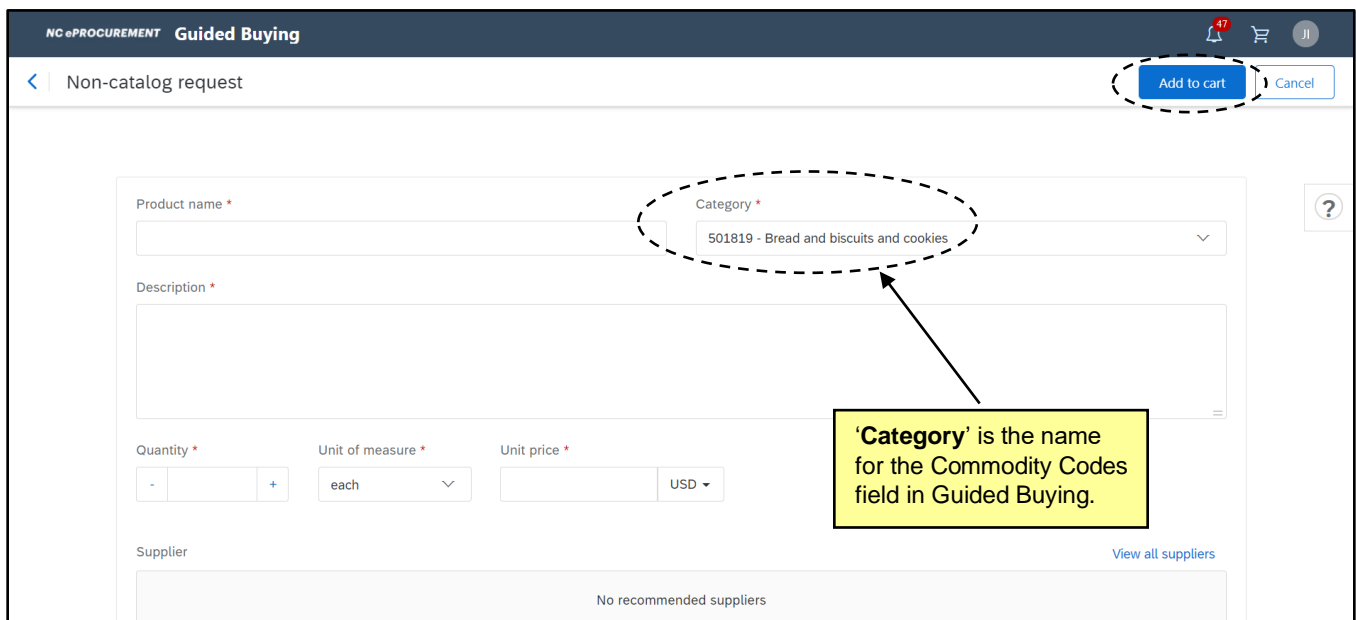


'**Category**' is the name for the Commodity Codes field in Guided Buying.

4. To add more items to your cart before checking out, use the back arrow to go to the Guided Buying landing page and continue shopping. Click '**Check out**' to go to the Summary page.



5. On the Summary page, click the arrows to expand sections and access more fields.



Use the arrows on the Summary page to expand different sections and see more detailed information.

6. After expanding the sections for the inventory line item, scroll down to the '**Others**' section and expand it to see the '**Item ID**' and '**Warehouse ID**' fields.

7. Click the drop-down arrow and use '**Browse all**' to add values to each field.

**Note:** The **'Warehouse ID'** field values will be scoped based on the selected **'Item ID.'**



8. The following fields will automatically populate based on the selected **'Item ID'** and **'Warehouse ID'** values.

   a. **Stock Keeping Unit** - Inventory items are replenished using a Stock Keeping Unit (SKU). This field defaults based on the Item ID and is not editable.

   b. **Company** – Once populated, this field is editable by the user.

      **Note:** If the Company, Account, or Cost Center is set as a default value in the user's profile, the inventory item will not overwrite the user's chosen preferences. It will, however, populate any remaining non-defaulted accounting fields. If the user does not have a default value set in their profile, the selection of the inventory item will default the appropriate NCAS values.

   c. **Account** – Once populated, this field is editable by the user.

   d. **Cost Center** – Once populated, this field is editable by the user.

   **Note:** If a user has manually entered a value in any of the above fields before the **'Item ID'** has been selected, or if they are editing a catalog line item, the default values will not overwrite the user-entered values.

9. The following fields will need to be populated on the line with the correct information to match the **Item ID** by expanding each section as needed.

   a. **Full Description** – a detailed explanation of the item.

   b. **Commodity Code** – the appropriate 6-digit UNSPSC Commodity Code.

   c. **Price** – the cost based on Unit of Measure.

   d. **Unit of Measure** – the selected **Unit of Measure** must match the Stock Keeping Unit associated with the inventory **Item ID.**

   e. **SKU Quantity –** This field is equal to the **Conversion Factor** multiplied by the **Quantity**.  This field is not editable.
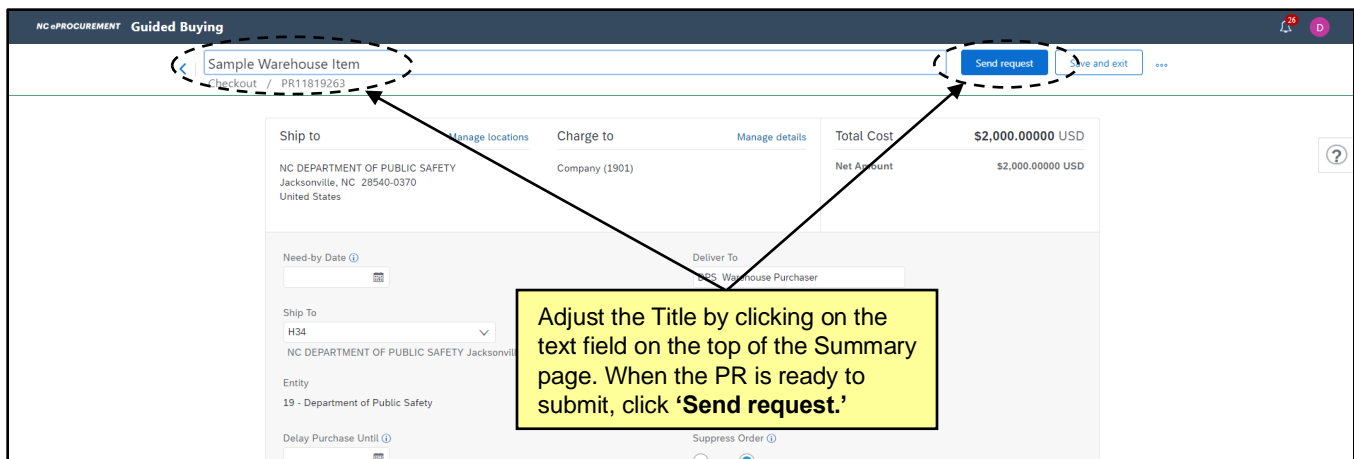
      **Example**:  The SKU for an **Item ID** is **'each,'** but the **Unit of Measure** on a catalog line item is **'box.'**  The **Conversion Factor** would be the number of items in the box.

   f. Select a **'Supplier'** using the drop-down menu if necessary. Use the drop-down menu and click **'Browse all'** to select the appropriate supplier**.**

   g. The **'Location'** field automatically populates when a Supplier is selected.  To change the default Location, click the **'Browse all'** link in the drop-down menu for Location.

   h. Adjust the quantity in the **'Quantity'** field if necessary.

**Note:** Shipping/Freight charges should be included as a separate line item on the PR using the freight commodity code, **'781018 – Road cargo transport.'**  This commodity code will exempt the supplier from the 1.75% transaction fee on shipping.

10. Adjust the Title of the Summary page if necessary by clicking on the field and entering a new title.  After reviewing the PR details for any other incorrect information, click **'Send request.'**

**Note:** To prevent errors in the event of a change order, it is recommended that inventory and non-inventory items are entered on separate PRs.

## III. Change Orders for Inventory Items in Expert View

Change orders can be created to decrease the quantity of Inventory Items.

Adding new Inventory Items to an existing inventory order or increasing the quantity of an existing Inventory Item will cause the Change Order to fail validation within NCAS. A new Purchase Requisition (PR) should be created if additional Inventory Items are required.

1. Search for the PR and click the **'Change'** button to initiate a Change Order.



2. The quantity can be decreased directly from the **'Summary'** page or by clicking the **'Edit Details'** link in the Actions drop-down.

    **Note:** Receiving and invoicing status rules still apply. Please see the **'Receiving'** job aid for details.



3. Click **'Submit.'**

# IV. Change Orders for Inventory Items in Guided Buying

Change orders can be created to decrease the quantity of Inventory Items. Adding new Inventory Items to an existing inventory order or increasing the quantity of an existing Inventory Item will cause the Change Order to fail validation within NCAS. A new Purchase Requisition (PR) should be created if additional Inventory Items are required.

**Note:** There is no system search in Guided Buying. If a Change needs to be made for a PR created by another requester, then first navigate to Expert View and use the search options available in that view.

1. Find or search for the PR on the **'Your Requests'** tab and click the **'Change request'** button.



2. The quantity can be decreased directly from the **'Summary'** page. Other fields may be edited by expanding each section as needed

   **Note:** Receiving and invoicing status rules still apply. Please see the **'Receiving'** job aid for details.



3. Click **'Send Request.'**